

## **Add a Staff Person to CAP 2.0**

In CAP 2.0, each CAP user will have a unique user name and password. There are several benefits to this enhancement:

1. For each transaction in CAP, the transaction detail will show who started the transaction, who issued the commitment or certificate, as well as the field issuer whose signature appears on the document.
2. You will be able to sort transactions by a specific staff person.
3. For security reasons, if a staff person leaves your employment, your Participant Administrator can inactivate the employee's access to CAP records.

There are two roles that can be assigned to the Participant and staff:

A **Participant Admin** can add or remove CAP Staff. The Participant Admin can also access all transactions associated with the ITG Participant, and modify the Participant Detail screen, including submitting the renewal application. Either the Participant or the Primary Contact for the Participant is assigned the role of the Participant Admin.

A **Participant Staff** can issue a commitment or certificate under the Participant's signature.

In addition, the Participant for an Attorney, or the Primary Contact and each Participant Admin for the Abstractor or Real Estate Closer, are assigned the role of **Payer**, which allows access to the E-Payment portal. A Participant Admin and Participant Staff can also be designated as a Payer.

## **Getting Started**

The CAP user associated with the Participant (either the individual attorney or the primary contact for the legal entity) is automatically assigned the role of Participant Admin (abbreviation for Administrator) and Participant Payer.

## How to Add a Participant Admin or Staff

In the Participant Detail screen, click on the **Associations** tab.

**Participant Detail** To complete annual renewal, click on [Renew Service](#). [Return to listing](#)

<b>Company Name:</b>	Exact Instructions Closing, LLC	<b>Office Phone:</b>	(712) 555-5555	<b>Participant#:</b>	10529
<b>Doing Business As:</b>	Best Ever Closers	<b>Work Email:</b>	merry.closer@EIC.com	<b>Participant Type:</b>	Real Estate Closer
		<b>Address:</b>	555 MAIN STREET, BELLE VISTA, IA 55555-5555	<b>Services:</b>	FieldIssuer, RealEstateClosing
				<b>Vendor #:</b>	<input type="text"/>
				<b>Customer #:</b>	162761

Participant **Associations** Contract Compliance Training Uploads Notes Reports

In the example below, the Participant Admin and Participant Staff have been activated or inactivated.

Participant Associations Contract Compliance Training Uploads Notes Reports

**CAP Users (staff that can issue a commitment or certificate under your signature)**

Choose existing users from your company

+ Create New User						
	Name	Phone	Email	User Name	Status	Admin/Staff
View	Baker, Ruth	(712) 555-5555	rbaker@EIC.com	rbaker	InActive	Participant Staff
View	Brown, Mary	(555) 555-5555	mary.brown@company.com	mary.brown	Active	Participant Staff
View	Closer, Merry	712555555	mcloser@EIC.com	merry.closer	Active	Participant Admin
View	Jones, David	(712) 555-5554	djones@EIC.com	djonesjr	Active	Participant Staff
View	Robinson, Carolanne	(712) 555-5555	crobenson@EIC.com	crobenson	InActive	

**Affiliations (other businesses such as a law firm, closing company, title plant, etc. that the participant works for, or has an ownership of or management of)**

Name	Address	City	Phone	Email
Affiliations have not been assigned to this participant.				

To **choose existing users from your company**, click on **Add** to select a staff contact already assigned to another Participant in your company.

Participant Associations Contract Compliance Training Uploads Notes Reports

**CAP Users (staff that can issue a commitment or certificate under your signature)**

Choose existing users from your company



**Note!** Once a staff person has been assigned the Participant Admin and/or Payer role in CAP, the Admin/ Payer role will be the same for every associated Participant. For example: If Jane Smith is a Participant Admin and Participant Payer for Attorney A, if she is added as a staff person to Attorney B, Jane will also be a Participant Admin and Participant Payer for Attorney B.

To add a new Participant Admin or Participant Staff, click on the  to **Create New User**.

Complete the required fields.

**Select Status:** Active or Inactive. Active should be selected for all current employees that need to access CAP. If an employee leaves your company, he/she should be marked as Inactive.

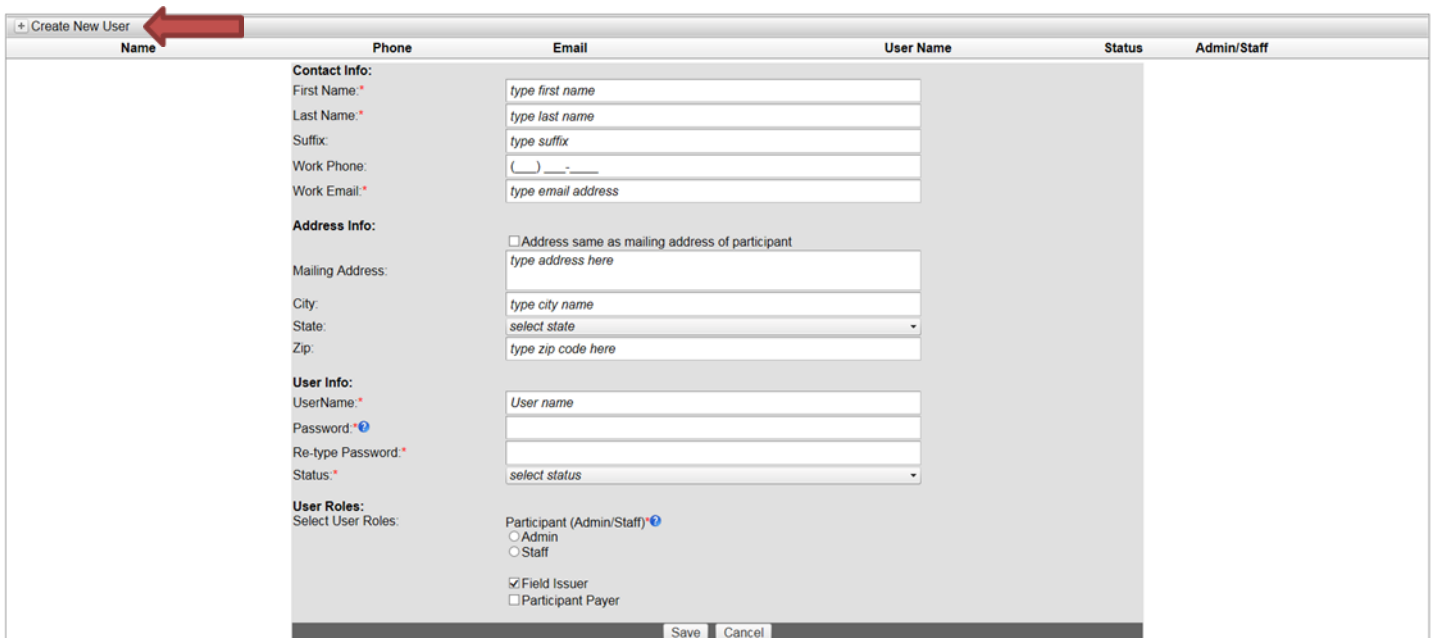
Click on **Admin or Staff**.

If a Participant has been approved as a Field Issuer, the **Field Issuer** button will be auto-checked for all staff. To allow access to the E-Payment portal, click on **Participant Payer**.

**Note!** If the new staff will be a Payer only (not creating commitments and certificates), click on **Staff and Participant Payer**, and uncheck the **Field Issuer** button.

**Note!** Remember to give your staff person the user name and password that you have assigned to him/her.

Click on **Save**.



The screenshot shows a web form titled "Create New User". A red arrow points to the "Name" field. The form is organized into several sections: "Contact Info:", "Address Info:", "User Info:", and "User Roles:". The "Name" field is the first input field. Below it are fields for "First Name:", "Last Name:", "Suffix:", "Work Phone:", and "Work Email:". The "Address Info:" section includes a checkbox for "Address same as mailing address of participant" and fields for "Mailing Address:", "City:", "State:", and "Zip:". The "User Info:" section has fields for "UserName:", "Password:", "Re-type Password:", and "Status:". The "User Roles:" section has a label "Select User Roles:" and three radio buttons: "Participant (Admin/Staff)", "Admin", and "Staff". There are also two checkboxes: "Field Issuer" (checked) and "Participant Payer". At the bottom right, there are "Save" and "Cancel" buttons.

Name	Phone	Email	User Name	Status	Admin/Staff
<b>Contact Info:</b>					
First Name:*		type first name			
Last Name:*		type last name			
Suffix:		type suffix			
Work Phone:		( ) -			
Work Email:*		type email address			
<b>Address Info:</b>					
		<input type="checkbox"/> Address same as mailing address of participant			
Mailing Address:		type address here			
City:		type city name			
State:		select state			
Zip:		type zip code here			
<b>User Info:</b>					
UserName:*		User name			
Password:*					
Re-type Password:*					
Status:*		select status			
<b>User Roles:</b>					
Select User Roles:		Participant (Admin/Staff)*			
		<input type="radio"/> Admin			
		<input type="radio"/> Staff			
		<input checked="" type="checkbox"/> Field Issuer			
		<input type="checkbox"/> Participant Payer			
<div>Save Cancel</div>					


## Edit a Participant Admin or Staff Record

You may change a staff person from Admin to Staff, from Staff to Admin, add or remove the Payer role, update the Contact information, or inactivate a current CAP user.

Click on the  next to the name.

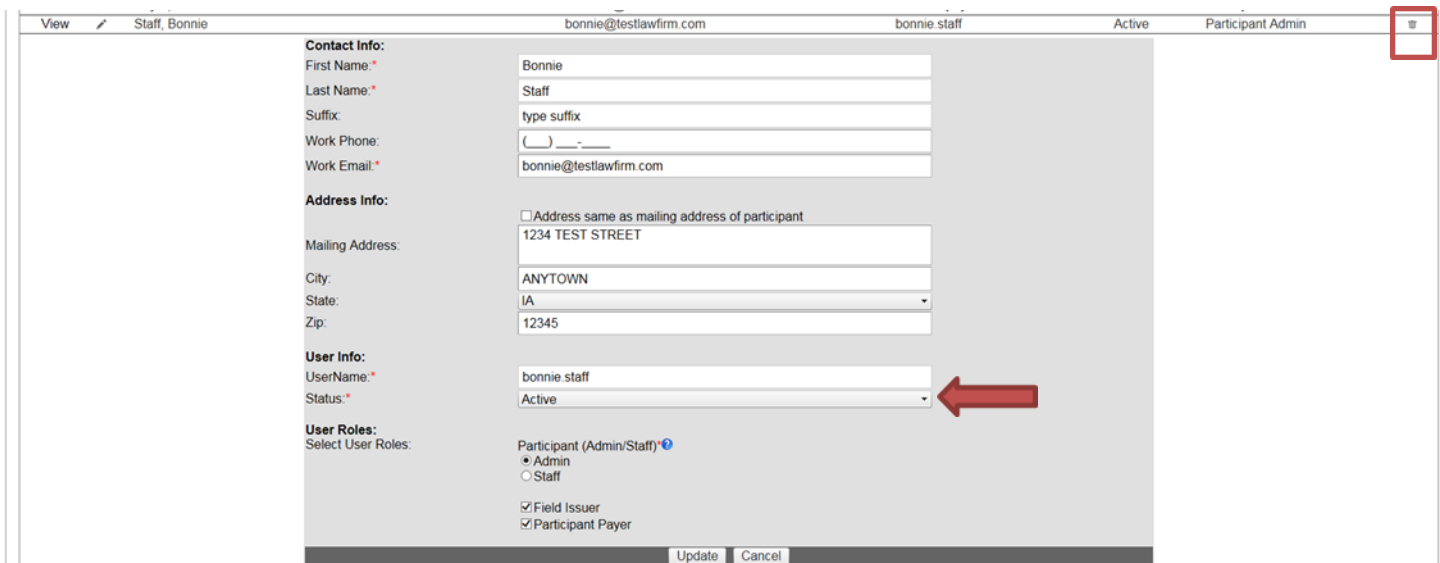
Modify the contact info, address info, user info or user roles.

To inactivate a user, click on Status: Inactive. This inactivates the user in CAP for all associated Participants.

**Note! To remove a user from one Participant only, click on the  icon to disassociate the CAP User with the selected Participant. This should be used when a staff person no longer works for a specific Participant.**

To modify the user role, click on Select User Roles: Admin or Staff. If a staff person is associated with more than one Participant, modifying the User Role in one Participant's record will modify the User Role for the staff person in the all associated Participant records.

Click on **Update**.



The screenshot shows a web application interface for editing a participant record. The top navigation bar includes 'View', 'Staff, Bonnie', 'bonnie@testlawfirm.com', 'bonnie.staff', 'Active', and 'Participant Admin'. A red box highlights a trash icon in the top right corner. The main form is divided into several sections:

- Contact Info:** First Name (Bonnie), Last Name (Staff), Suffix (type suffix), Work Phone (\_\_\_\_-\_\_\_\_-\_\_\_\_), Work Email (bonnie@testlawfirm.com).
- Address Info:** ☐ Address same as mailing address of participant, Mailing Address (1234 TEST STREET), City (ANYTOWN), State (IA), Zip (12345).
- User Info:** UserName (bonnie.staff), Status (Active). A red arrow points to the Status dropdown menu.
- User Roles:** Select User Roles: Participant (Admin/Staff) (Admin selected), Field Issuer (checked), Participant Payer (checked).

At the bottom of the form are 'Update' and 'Cancel' buttons.